



Project Management Newsletter

Industry

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New Format

The eCameron Newsletter is taking on a new format. Each Newsletter will contain two sections – a feature article and a secondary topic. This month feature topic is part one of a four part series on managing Red Projects. The secondary topic discusses an estimation tool for the Project Manager.

In each subsequent issue the secondary features will rotate within a set of three broad topics.

- **Tools:** Usable tools in the form of application (Word, Excel, PowerPoint, etc.) templates or processes that can be used as starting points in a project.
- **Communication:** Communication is so critical in projects that it needs special attention. Regular articles will discuss communication techniques.
- **Management Technique:** A discussion of techniques to improve management style.

Newsletters are monthly and are issued mid-month. To be added or removed from the distribution, send an email to:

newsletter@ecaminc.com.

Next Issue

Discussion Topic:

Red Project Management Part 2: Back to the Basics. Part two will cover the first few surprisingly simple steps in getting a project back on track.

Management Technique:

Complex Management Structures. A discussion of loose knit programs with multiple Project Managers and additional requirements needed to ensure a good working model.

Red Projects

Red Projects are either over budget, behind schedule or both. Options for addressing a Red Project fall into three general categories: 1) accept the condition as an attribute of the project (i.e. ignore it), 2) cut your loses and cancel the project, or 3) attempt to fix the project through rescoping, restructuring, reshaping and recovering. The latter, project recovery, is an area in which eCameron has significant experience. While every project is different, there are some common threads inherent in all projects.

The next four issues of the *Project Management Newsletter* will discuss common project problems and methods to approach those problems. In this issue the discussion will be on the most common root cause of project problems – lack of communication. Part Two will address getting the project back to basics. Part Three will focus on a special role the Project Manager needs to play – “The Lobbyist”. And, finally, part four will discuss the benefits of using an outside resource to manage the recovery process.

Part 1: How it All Starts

Scope creep, inexperienced teams, poor management, a difficult customer or a widely dispersed team are the most common reasons cited for late or over budget projects. In most cases, these are contributing factors to the overarching issue of poor communication. Communicating objectives, goals and status are the primary responsibilities of the Project Manager. The Project Manager must encourage and facilitate two-way team communication; passing along pertinent and concise summaries to management.

Customers and management are far more tolerant of project delays when they are aware of the issues in advance and know that steps are being taken to solve the problem. In other words, communicating an issue is better than letting it be discovered after the fact.

In the long run, it is better to suffer the pain of the mistake at its onset than to let it fester into a bigger problem. Waiting does nothing but breed mistrust.

A typical project scenario might be as follows. Three major Functional Specifications are due on the first day of the month. The team is not doing well at getting them done. Since no

one likes to deliver bad news, the Project Manager is told that the specs are “going to be a little rough, but they will get done.” The Project Manager hears “they will get done”. The Project Manager needs to determine what a “little rough” means. He or she should to ask the questions like:

- Has there been a peer review?
- Have the interfaces systems been internally approved?
- Has the Solution Architect reviewed them?
- Has the customer seen any rough drafts?

Inherently, everyone trusts their team and thinks they will provide bad information as well as good. So these questions go unanswered.

The root of the problem is that no one likes conflict or to be the bearer of bad news. So the developer of Functional Spec “A” has not told the developer of Functional Spec “B” that he does not think the interface will work. After all he only “thinks” it, he does not “know” it; besides, it is not his job. As the message goes up the chain it drifts farther from the truth.

Armed with confidence, the Project Manager tells the customer the specifications will be delivered on time.

At the first of the month the Functional Specs are given to the customer for review and approval and the customer points out the obvious flaws. The customer goes to the Executive Committee and states their view of the problem:

"This is an inexperienced team that cannot design my system. Now we are late and need to add more features since we are going to miss our critical market window. Furthermore, since you cannot manage this project we want daily recovery meetings. Due to the extra effort we now have to expend to do your job, we want a credit for services not rendered and sold to us under false pretences. If this continues we want a new Project Manager."

The demands may be different, but the result is the same. Because of poor communication a significant amount of additional work is required. Work to: calm the customer, discover the source of the problem, stop the inevitable "finger pointing", attempts to assign blame, control endless meetings and, the most dreaded of all, keep "corporate" from coming on-site to "help".

The solution is obvious, better team communication, better customer communication. The Project Manager needs to be the facilitator of this communication as well as overseeing the progress of the team and managing the customer. (Part 3 in this series will explore this in more detail.) But now the Project Manager needs to fix what has gone wrong. The project is broken. It wasn't done correctly the first time, so now it may need to be completely redone. This time correctly. The customer has to be convinced the problems will be corrected and this or similar problems will not reoccur.

Action needs to be quick, clear and decisive.

Step one: The Project Manager should take the blame. Obviously the project is theirs to manage and hence they own the problem, all of it. They should make sure the customer and team realize it is the Project Manager's fault – even if there is strong evidence to the contrary. It is not productive to argue about blame. The process of discovery will come later; after more investigation. The current task is to calm the situation.

This step, although simple, is often ignored but is critical in stopping the finger pointing and fighting; allowing people to focus on fixing the problem. The people on the project need to be objectively involved in order to fix the problems. This will start the team building process. By doing this the Project Manager is taking the first and immediate step in taking charge so that he or she can move forward providing leadership.

Step two: The Project Manager needs to sit down with each of the key stakeholders and do the following:

1. Again, accept the blame.
2. Ask them their opinion of what went wrong.

3. Listen. Write it down, but do not publish minutes. This needs to be confidential and these stakeholders need to know it will stay that way.
4. Prior to the meeting, compile a list of three things that have contributed to the problem. Frame each issue as being the fault of the Project Manager. Ask a question like "I see that I could have done better at 'X' and 'Y', what else do you think I need to improve?" The goal is for the stakeholder to supply the third answer. If they don't respond, prompt them with "How about 'Z'?" Use this to try to get the person to think objectively.
5. Give the stakeholder a short-term plan to fix the project. Dynamically fold in their comments. This helps insure that they know that you listened to them and value their opinion.

Depending on the organization, the number of stakeholders may be too large to talk to each one. In this case talk to the one's that are closest to the project and will apply the most pressure if a recovery plan is not put into place. Depending on the project structure this may be the Executive Committee, Steering Committee, corporate management and/or customer's management interface. Usually there are about five to eight people.

The goals of this step are to start confidence building, buy time to determine the problems and develop a recovery plan thereby exhibit the Project Manager's ability to fix the problems.

Step three: The Project Manager needs to visibly sit with each and every team member (in a large team this may need to be limited to the managers and leads) and ask each one what went wrong. This is done for two reasons – first, to improve communication, and, second, because the answers to the problems usually are known inside the team.

Everyone needs to know to whom the Project Manager is talking and it must be a neutral selection (such as, all of the leads). It cannot be perceived as an attempt to find the faulty party or lay blame; otherwise team members will not be candid.

Often the most obvious answers are the hardest to find. If the team has been operating without good internal communication or using a flawed methodology, they may be stuck in thinking this is the only way to do a project. It is the Project Manager's job to get them to think and work differently. Talking openly to the individually team members starts this process.

Herein lies the first major set of hurdles. This is something new, team members will be wary of change. It may be extremely hard for them to be forthright. Do they feel they can trust the Project Manager? If, in the past, the Project Manager has tried to blame others and has not stood up for the team it could be a tough job to convince them that their words are not going to come back to haunt them.

Leading questions should be avoided. This will only bias the response. Only open-ended questions should be asked. If responses are inadequate, a leading hypothetical question might help. It should be something that is surely not a problem. This could help in getting the person to open up.

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Ensure the person being interviewed thinks about their response. Each team member's input must be valued, but it is the Project Manager's job to challenge the ideas and make the person providing input think critically about their comments. This process is attempting to pull out the underlying basis for why the person thinks the way they do and to keep them from repeating the standard response among the team – the response they bemoan around the water cooler.

For example, designer 'A' indicates designer 'C' does not have the expertise needed to complete the functional specification at hand. One approach might be to counter the statement with a suggestion that designer 'B' work with 'C' to fill in the gaps, or that the component that designer 'C' is trying to design is ill conceived – the concept is flawed, not the design. Note that by taking this approach 'A' is not being asked to fix the problem. Now is not the time for that. If 'A' needs to do that, it should be done as part of the resulting recovery plan.

Management/Design:

- Management
- Architect
- Leads
- Meeting time

Development:

- Multiple component modification in a single change (Client GUI, Web GUI, Mainframe input)
- Functional Specifications
- Design Specifications
- Coding

QA:

- Review designs
- Multiple component modification in a single change (Client GUI, Web GUI, Mainframe input)
- Test Case Development (manual and automated)
- User Guide testing

Training:

- Requirements review
- Training material modification (classroom, web based, etc.)
- User Guide, Quick Reference updates
- Help module changes

Modeling:

- Requirements review
- Modeling
- Test case development
- Testing

Ongoing:

- Deployment
- Support
- Help Desk effort

Analyze the response. This will require an artful approach. The Project Manager should not agree that 'C' is incompetent, but they should not disagree either. The goal is to pull 'A' out of the rut he or she may be in and look for other sources and solutions for the problem.

This should be done with all the interviews. As this process proceeds, patterns and trends may start to emerge. These all need to be considered while the Project Manager shapes the plan of action.

Step four: Next is the arduous task of deciphering the data. There are dozens of suggestions, comments and criticisms. Which are useful and which are not? Which ones reveal the root causes of problems within the team, deficiencies in the customer, management, or the Project Manager?

Based on the information gleaned, a plan must be developed for improving communication as well as the project. The key is the Project Manager. The Project Manager needs to reinforce the plan every day and help people see its benefit. People will naturally drift back to their old ways and the Project Manager needs to keep them on task.

Part two will discuss tools to make this plan work – back to the basics. In addition, it will spend some time on how to regain the confidence of the customer and the team.

Tools for the PM: Estimation Tool

From the inception to completion of a project one thing is constant – change. With each change comes a set of estimates to determine the impact on the project. Estimates are needed when determining the effort required to address change requests, missed deadlines, scope creep, bug fixes and maintenance. Each change, or bug, can be thought of as a project of its own that may be folded into the ongoing project.

That being the case, an estimate needs many of the same basic steps required in a project:

1. Estimation of the time to analyze the change.
2. An estimate of task, time and resources
3. A list of assumptions
4. A risk register and impact analysis
5. Funding and approval to commence.

Not all of these steps need to be done for all projects. For instance, in the classic "waterfall" project the number of changes can dramatically increase in the last few months of the project when the customer sees what, up until now has only been talked about. For this reason, time to estimate the effort has a greater impact. Just when the project needs the time for bug fixes and deployment, the demand for changes and estimating their impact becomes greater, demanding more time from the team. Generally, the customer does not see the impact of simply requesting changes, and may not care. Providing an estimate of this impact can often enlighten them on the effect of their requests.

Figure 1 - Example Data Gathered in a Template

Some projects may not see this issue. In a project following an Agile Methodology, this bubble of requests should be less and time to estimate the effort may not be needed at all. As the name implies, these projects are highly adaptive to change and have other processes to handle the effects.

Regardless, one does need to know, with a good degree of confidence, the function, effort and risk in the change and whether it will fit in the current project timeline.

A common error is assuming the change is simple and will not require either an estimate or a change request. At first this may seem an acceptable approach, since it minimizes conflict and pleases the customer. But if not properly managed, this approach can balloon into missed milestones, significant additional scope and added expense to the project.

A simple process, implemented early in the project, for handling estimations will help fix this issue before it arises. For the most part, the tool needs to be a log that captures each group's level of effort, risk and assumptions. Generating a base template and routing that to the team can gather the required information for the estimate with little effort from the Project Manager. By using a standardized form a number of potential problems can be averted because:

1. It communicates the change to everyone in the team.
2. It removes the guesswork of the team management.
3. It documents risk and assumptions early in the process, refining the request.
4. It reduces the chance of overlooking a group's contribution to a component.
5. It provides traceability for the estimate and the change.

A simple solution is a spreadsheet in the form of a template that can be reused for each estimate. Each group should have their own area to complete. Figure 1 is an example of some of the data that should be gathered in the template.

The template must be customized to the project and significant time should be spent ensuring that it covers each component on the project. If the project has a web, mainframe and PC component each should be called out in the template. This reduces the chance that a team member will forget work that may be required.

The change request and estimates should be reviewed with the team leads at both the beginning and the end of the process to insure the concept of the request is not inconsistent between team members.

Risks should be assessed. Risks that have too high a probability of occurrence should be incorporated in the project plan and funds earmarked for use if they occur.

In conclusion, defining a process and using a standardized form to estimate the impact of changes provides many of the basic needs for the project. These include:

1. Improved communication,
2. Visibility to additional effort in the project,
3. Ability to push back using quantified data,
4. Traceability for the estimate and the change,
5. Risk and assumptions associated with the modification,
6. Cost and schedule impact.

An Excel template and process for a software development project can be found on eCameron's website on the template page (<http://www.ecaminc.com/Templates/EstimateXL.html>).

Resources and Templates

eCameron's website contains a large variety of reference materials on Project Management subjects. These include templates, processes and further discussions on a variety of topics. Please feel free to browse our site at www.ecaminc.com

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Subject	Description	Format	Location
Templates Homepage	Home page for the items listed below	Various	http://www.ecaminc.com/Templates/Templates.html
Change Management Process	A complete Change Management process document.	Word	http://www.ecaminc.com/Templates/CRProcessWord.html
Change Log Template	An Excel template for a change log.	Excel	http://www.ecaminc.com/Templates/CRLogXL.html
Change Request Template	A Word template change request form.	Word	http://www.ecaminc.com/Templates/CRFormWordDot.html
Estimation Template	An Excel template for estimating project changes.	Excel	http://www.ecaminc.com/Templates/EstimateXL.html
Executive Presentation Material	Various presentation ideas and templates for concisely expressing complex data to executives.	Power-Point	http://www.ecaminc.com/Templates/ExecSummary.html
Generic Project Document Template	General project template to be used for specification and other control documents.	Word	http://www.ecaminc.com/Templates/ProjectDocDot.html
Meeting Minutes Template	A Word Template for Meeting minutes.	Word	http://www.ecaminc.com/Templates/MinutesWordDot.html
Risk Tool	A risk probability accumulator. Aggregates risk into a project level impact.	Excel	http://www.ecaminc.com/Templates/RiskToolXL.html
Time Reporting	Excel Template for tracking time reporting	Excel	http://www.ecaminc.com/Templates/TimesheetXL.html
Previous Newsletters published by eCameron.		PDF	http://www.ecaminc.com/ColProjMgmt/CPMIndex.html
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